

NetOffice User Manual

Ctrl-click any topic to jump to that section.

INTRODUCTION	3
GETTING STARTED	3
GETTING ORIENTED	4
ICONS	5
PREFERENCES	5
USER PROFILE	5
PASSWORD	6
NOTIFICATIONS	6
ADD NEW CLIENTS	7
EDIT CLIENT USER	9
PROJECTS	10
EDIT PROJECT	11
PROJECT TEAM	12
PHASES	13
TASKS	14
EDIT TASKS	16
DISCUSSIONS	17
NOTES	19
NEW SUPPORT REQUESTS	19
MANAGING SUPPORT REQUESTS	20
LINKED CONTENT	21
UPLOAD NEW DOCUMENTS	21

UPDATE DOCUMENTS	23
PROJECT SITE	23
PROJECT SITE USERS	24
CLIENT ACCESS	25
PUBLISH	26
DELETE SITE	27
OTHER FEATURES	27
REPORTS	27
SEARCH	28
BOOKMARKS	32
GNU FREE DOCUMENTATION LICENSE	34

INTRODUCTION

NetOffice is an internet-enabled system for use in projects that require collaboration over the internet. Those organizations, such as consulting firms, that rely on a division between firm-side and client-side information will benefit most from use of NetOffice. The system is divided in two parts which we will call "**Internal Project Site**" and "**Client Project Site**." The project team, excluding the client, has access to the Internal Project Site. On the Internal Project Site, users fall into several categories: **Administrator, Manager, and User**.

Administrators can maintain both business and technical aspects of the system. Managers administrate projects: they can add and edit clients, projects, project details, calendars, and reports but cannot upgrade the system, create new or change existing system users, or access the database. Users can view most information but can only add new discussions, notes, tasks, and linked content. The Internal Project Site users also have access to the Client Project Site on the projects to which they are assigned.

Client users do not have access to the Internal Project Site. When clients log in at the login page, they are directed to the Client Project Site. On this Site, they can approve or reject documents, file support requests, review tasks, or add a message to the bulletin board. Clients only have access to their own projects and cannot view or edit projects that belong to other clients. Clients also do not have access to those items that the project manager or other team member does not publish to the Client Project Site.

GETTING STARTED

LOG IN

Enter the username and password (ask your system administrator if you do not know your username) in the login screen.

If you have forgotten your password, click "Forgot Password" and enter your username on the next screen. The system will email a new password to you if your user profile contains your correct email address.

Log In System Requirements License

Please log in

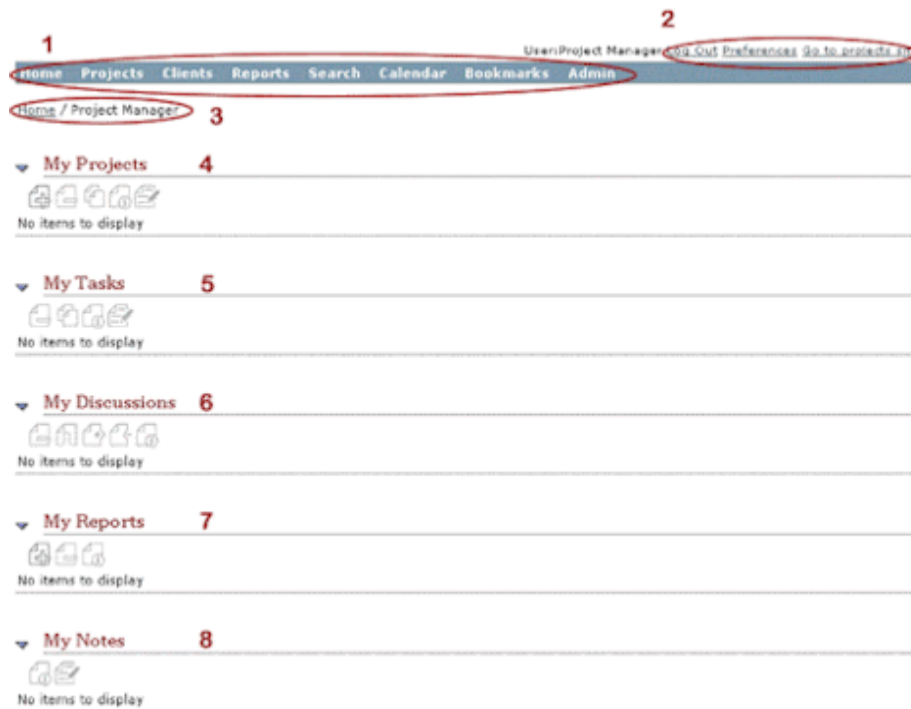
Language :

* User Name :

* Password :

[Forgot password ?](#)

GETTING ORIENTED



The Home Page (**Figure 1.2**) on the Internal Project Site will appear after you have successfully logged in. Other team members will also see this home page but the client will see an entirely different page, which is discussed in **Client Site** and in **Documentation for Clients**.

From this page, the manager or team member can access all aspects of the system except for the Menu Item labeled "Admin." "My Bookmarks" will appear above "My Projects" after the user has created bookmarks (project-related internet links).

1. **Main Navigation** (items circled with "1" in Figure 1.2). This menu bar appears at the top of every page on the Internal Project Site. To return to the home page from any part of the Internal Project Site, click on the item labeled "**Home**" in this navigation. The user can also access all the major components of the site using this navigation.
2. **Right Navigation** (items circle with "2" in Figure 1.2). These links appear in the top right corner of every page on the Internal Project Site. The user can log out or edit/view preferences. To view the external Client Project Site, click "Go to Project Site."
3. **Location** - the site user's location is projected under the Main Navigation ("3" in Figure 1.2). In some cases, secondary page navigation will also appear here.
4. **My Projects** - the user can see and access the list of current projects assigned to that user, or create new/ delete existing projects. The use can also access the list from "Projects" in the Main Navigation from anywhere on the Internal Project Site.
5. **My Tasks** - the user can see and access the list of current tasks assigned to that user, or delete existing tasks. The use can also access the task lists under each project by visiting that project's page.

6. **My Discussions** - the user can see, access, delete/close, or publish the list of current "discussions" (or conversational postings) on assigned projects. The user can also access the discussions under each project by visiting that project's page.
7. **My Reports** - the user can create new or delete existing project reports that include such information as outstanding tasks, status, and priority.
8. **My Notes** - the user can view and edit existing notes.

ICONS

-  - "Add"
-  - "Delete"
-  - "Publish" > will add to Client Project Site
-  - "Unpublish" > will remove from Client Project Site
-  - "Edit"
-  - "View"
-  - "Copy"
-  - "Import"
-  - "Export" - saves to spreadsheet
-  - "Close Discussion" - disallows further posts to topic

PREFERENCES

USER PROFILE

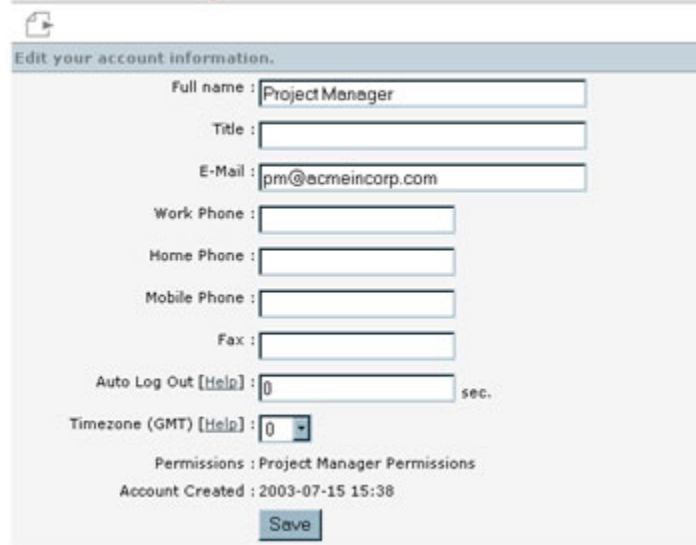
The user can reach "Preferences" by selecting the link in the top Right Navigation. In the user profile you can specify:

- **Full Name** (as opposed to user name)
- Title
- **Email** (for notification purposes)
- Work, Home, Mobile, and Fax
- Log Out - time with no activity after which system will log user out; "0" disables this function
- Timezone (GMT): the numbers correspond to global timezones; postings by user will be timestamped according to timezone chosen
- Permission level and account creation date are listed as read-only values

Only those users who are assigned to the user's projects can see the user's contact information and vice versa.

The user can **export** the values of his/her preferences to a comma delimited file.

User Profile : manager



Full name : Project Manager

Title :

E-Mail : pm@acmeincorp.com

Work Phone :

Home Phone :

Mobile Phone :

Fax :

Auto Log Out [Help] : 0 sec.

Timezone (GMT) [Help] : 0

Permissions : Project Manager Permissions

Account Created : 2003-07-15 15:38

Save

PASSWORD

The **system administrator initially creates usernames, passwords, and permissions**. Once logged into the system, the user can change his/her password by selecting "Change Password" in "**Preferences**."

If the user does not remember his/her password, he/she can have the password sent to his/her email address during the login process. If the user does not have an email address in the system, or does not recall his/her username, the user must request the password manually from the system administrator.



Home Projects Clients Reports Search Calendar Bookmarks

Preferences / [User Profile](#) | [Change Password](#) | [Notifications](#)

Change Password : manager

Enter your old password then enter and confirm your new password.

* Old Password :

* New Password :

* Confirm Password :

Save

NOTIFICATIONS

In the "**Notifications**" section of "Preferences," the user can choose whether to receive notifications via email (*at the email address specified in "Profile"*). All notification is the system default. To decline notifications, the user can either leave the email address field (in "Profile") blank or uncheck all of the boxes by selecting the "**Select / Deselect All**."

If the user wants to receive only a select group of notifications, he/she can choose on the basis of:

- new task assignment
- assigned task status, priority, or due date change
- new project assignment or removal
- new discussion topic or posting

Such notifications will occur only on assigned projects.

[Preferences](#) / [User Profile](#) | [Change Password](#) | [Notifications](#)

Edit E-mail Notifications : manager

Select events for which you wish to receive E-mail notification.

Select/Deselect All : ☐

- ☒ I am assigned to a new task.
- ☒ The status of one of my tasks changes.
- ☒ The priority of one of my tasks changes.
- ☒ The due date of one of my tasks changes.
- ☒ I am added to a project team.
- ☒ I am removed from a project team.
- ☒ A new post is made to a discussion.
- ☒ A new discussion topic was created.

ADD NEW CLIENTS

To create your first project in NetOffice, you must initially create a client to which to attach the project. Click on the **"Clients"** item of the top menu bar, then click on the

 button (on the **"Client Organizations" Page**.)

Fill out the form (requires only the "Name" field). If you upload a client logo, the client will be able to see that logo on the client site. Click the "Save" button when done.

Add Client Organization

Details

Owner : manager / Project Manager

* Name : Acme Inc

Address : 555 Broadway
New York, NY 10016

Phone : 2125552345

URL :

E-Mail :

Comments :

Logo : Browse

Save

When you have saved your new client, the main **"Client" Page** will appear. This page provides information about the client and lists projects and client-side users (who will access the client site as opposed to the team site). You can edit the Client

Organization's **"Details"** by clicking on the  on the **"Client Organization" Page** or by selecting the box (☒) next to the client's name in the "Clients" list on the **"Client Organizations" Page** and then clicking the  button above the list.

Success : Addition succeeded

Client Organization : Acme Inc

Details

Owner : Project Manager (manager)

Name : Acme Inc

Address : 555 Broadway New York, NY 10016

Phone : 2125552345

URL :

E-Mail :

Comments :

Created : 2003-07-15 16:24

ADD CLIENT USER

In order for your client users to log into their client site, you must first add him/her to the Client organization. Navigate to the main "Client" Page and scroll down to the section, "Client

Users." Select the  button in this section and the **"Add Client User"** Page will appear.

- **User Name** (required): Up to 16 characters - the name with which the client will login to the client site
- **Full Name**: Last and First Names
- Title: (optional) Client's job title
- Client Organization (required): Drop-down of existing client organizations in the system
- Email (optional): used for notifications
- Work, Home, Mobile, Fax Phone Numbers

- Comments
- **Password** (required): Up to 16 characters, letters, numbers, case-sensitive

Click the **"Save"** button when finished and the "Client Organization" Page will appear.

Add Client User

Enter details for the user account you are creating.

User Name :

Full name :

Title :

Client Organization :

E-Mail :

Work Phone :

Home Phone :

Mobile Phone :

Fax :

Comments :

Enter the user's password.

Password :

Confirm Password :

EDIT CLIENT USER

Once you have added a client user, you can **edit** this and other users for that client by navigating back to the "Client Organization" Page. Scroll down to the **"Client User" section** of the page and click on the name of the user whom you want to edit. The "Client User" Page

will load and you will be able to edit all of the above-listed fields after clicking the  button. You can also directly access the **"Edit Client User"** screen by selecting the box ☒ next to the user's name in the "Client User" list on the "Client Organization" Page and then clicking the  button above the list. Click the **"Save"** button when you have finished.

You can also **export** the user's contact information to a "Vcard" file by clicking the  button and then clicking "Save" on the resulting dialog box.

Client Organization : Acme Inc



Details

Owner : [Project Manager \(manager\)](#)

Name : Acme Inc

Address : 555 Broadway New York, NY 10016

Phone : 2125552345

URL :

E-Mail :

Comments :

Created : 2003-07-15 16:24

▼ Client Projects



No items to display

▼ Client Users



☐ Full name ▲	User Name	E-Mail
☐ Jane Acme	acme	

PROJECTS

ADD PROJECT

Once you have created the client to which to attach project, navigate to the "Projects" item in the top menu bar. Select the  button above the list and the "**Add Project**" Page will appear.

- **Project Name** (required): Up to 50 characters
- Priority (optional): Very High, High, Medium, Low, Very Low
- Description (optional)
- Development Site URL: if using a testing site
- Final Site URL
- **Owner** (required): Drop-down of existing team users in the system
- Client Organization (optional): Drop-down of existing client organizations in the system
- **Enable Phases** (required): Drop-down of project types which will create certain phases (this can be customized)
- Status (optional): Not Started, Open, Suspended, Client Completed, Completed
- Max file size: defaults to system-wide setting; set to larger size if you know that you will be uploading large files during the course of the project or smaller if you want to conserve space and limit user uploads (have the sys admin reset the maximum allowable file size for the system)

Click the "**Save**" button when finished and the "**Project**" Page will appear. *(Note: Occasionally there is a mySQL error here but generally the user is added anyway. Check with your system administrator if this error occurs.)*

Add Project

Details

Name:

Priority:

Description:

Development site url:

Final site url:

Owner:

Client Organization:

Enable Phases:

Status:

Max file size: Bytes

EDIT PROJECT

When you have saved your new project, the main **"Project" Page** will appear. This page provides:

- Project **Details**
- **Project Site** Create
- **Support** requests information
- **Discussions**
- **Team** members list
- **Linked Content** (documents)
- **Notes**

You can edit the Project **"Details"** by clicking on the  on the "Project" Page or by selecting the box (☒) next to the project's name in the "Projects" list on the

"Projects" Page and then clicking the  button above the list.

▼ **Project : Acme Website**

Details

Name : Acme Website
 Project ID : 14
 Priority : High
 Active phase(s) : No phase is currently active
 Description : acme company website - phase 1
 Development site url : <http://www.acmeincorp.com>
 Final site url : <http://www.acmeincorp.com>
 Owner : [Project Manager \(manager\)](#)
 Created : 2003-07-15 19:40
 Modified :
 Client Organization : [Acme Inc](#)
 Status : Open
 Max file size [[Help](#)] : 4.88 MB
 Project folder size [[Help](#)] : -
 Estimated Time : hours
 Actual Time : hours
 Scope creep [[Help](#)] : Days
 Project Site : <[Create...](#)>

Support

New requests : 0 - [Manage new requests](#)
 Open requests : 0 - [Manage open requests](#)
 Complete requests : 0 - [Manage complete requests](#)

PROJECT TEAM

To add members of your own organization to a project, the user must already exist in the system. Only a system administrator can create new non-client team users. To add an existing user to your team, navigate to the "Project" Page for the project to which you want add team members.

Scroll down to the "Team" section in the middle of this Page. Click on the  button above the "team"member list, and the **"Add Team Members"** will appear. Select the checkbox (☒) next to the desired user's "Full Name" field then click the  above the list.

User: Project Manager [Log Out](#)

[Home](#) [Projects](#) [Clients](#) [Reports](#) [Search](#) [Calendar](#) [Bookmarks](#) [A](#)

[Projects](#) / [Acme Website](#) / [Team Members](#) / [Add Team Members](#)

Add Team Members

☐ Full name ▲	Title	User Name	Work Phone
☐ Collabowrite		collabowrite	None
☒ Demo Team Member		teammember	None

The "Project" Page will load with the team member listed in the **"Team"** section. To view the details of the team member, either click on the user's name or select the checkbox (☒) next to the desired user's "Full Name" field then click the  button above the list.

To **delete** a team member from the project, select the checkbox (☒) next to the desired user's "Full Name" field then click the  button above the list.

 **Discussions**



No items to display

 **Team**



☒ Full name ▲	Title	User Name	Work Phone
☐ Demo Team Member	None	teammember	None
☐ Project Manager	None	manager	None

 **Linked Content**



No items to display

 **Notes**

PHASES

All projects in NetOffice follow a **project lifecycle** methodology, meaning that they are broken down into phases, then tasks. Your system administrator can customize these phases, in terms of number, order, and names. When you [create the project](#), the **"Enable Phases"** type you chose will automatically create the pre-determined set of phases in your new project (*Note: you can also choose not to enable phases at all*).

You can edit the information pertaining to a particular phase by clicking on the name of the phase in the **"Phases" section** of the "Project" Page, and then clicking the edit button when you reach the "Phase" Page. You can also select the box (☒) next to the phases's name and then clicking the  button above the list.

Estimated Time : hours
 Actual Time : hours
 Scope creep [[Help](#)] : Days
 Project Site : <[Create...](#)>

Support

New requests : 0 - [Manage new requests](#)
 Open requests : 0 - [Manage open requests](#)
 Complete requests : 0 - [Manage complete requests](#)

▼ **Phases**

☐ Order ▲	Name	Total Tasks	U
☐ 0	Planning	0	0
☐ 1	Design	0	0
☐ 2	Production	0	0
☐ 3	Testing	0	0
☐ 4	Sign-off	0	0

When the "Phase" Page for editing appears, you may alter the following fields:

- **Status:** Not Started, Open, Complete, Suspended
- **Start Date:** clicking on the  will open a small calendar from which to choose a date
- **End Date:** this is an actual not projected date
- **Comments**

Click the "**Save**" button when finished and the "Phase" Page will appear.

▼ **Phase : Planning**

Details

Name : Planning
 Phase ID : 40
 Status : Not started ▼
 Start date : 2003-07-15 
 End date : - 
 Comments :
Save

TASKS

Each phase of your project should contain tasks, which in turn can contain sub-tasks. To add a new task, navigate to the "**Phase**" Page and scroll down to the "**Tasks**" section.

Click on the  button above the list of tasks, and the **"Add Task" Page** will appear. You can edit the following fields:

- **Project** (required): Drop-down of existing projects in the system
- **Task Name** (required): short title of task (ie - "Create Site Map")
- Description
- Assigned To (optional): Drop-down of team members on that project and client users if added to client site
- **Phase** (required): list of phases enabled for that project
- **Status** (required): Not Started, Open, Suspended, Completed, Client Completed
- Start Date (optional): the  button opens a calendar from which to choose a day
- Due Date (optional): this is a projected not an actual date
- Estimated Time (optional): in hours
- Actual Time (optional)
- Comments (optional)
- Publish check box - you may publish the task if you have already created the client site

Click the **"Save"** button when finished and the **"Task"** Page will appear.

Add Task

Info	
Project :	Acme Website
Phase :	Planning
Client Organization : Acme Inc	
Details	
Name :	Create Project Plan
Description :	make ms project plan with milestones and contingencies
Assigned to :	manager / Project Manager
Phase :	Planning
Status :	Open
Completion :	10 %
Priority :	Very high
Start date :	2003-07-15
Due Date :	2003-07-18
Estimated Time :	4 hours
Actual Time :	hours
Comments :	

EDIT TASKS

VIEW

To view task information, click on the "Task" name field in the list on the "Phases" Page. You can also view tasks assigned to you by navigating to the Home Page and click on the task's name in the "My Tasks" section. The **"Task" Page** will load, containing the following sections:

- Task Info
- Details
- **Update History**
- **Linked Content**: documents that are assigned only to the task
- **Assignment History**: if the tasks has been assigned to multiple users, the dates, users assigned, and comments will appear here

EDIT

To edit main task information, click on the  button on the "Task" Page or select the box (☒) next to the task's name in the "Task" section on the "Phase" Page and then clicking the  button above the list.

You can edit all the details of the task in **"Add Task"** except for the Phase and Client Organization. Additionally:

- **Complete Date**: actual date of completion
- **Assignment History** Comments

Press the **"Save"** button when finished.

DELETE

To **delete** a task from a phase, click the  button on the task's "Task" Page. You can also delete the task from the "Phase" Page by selecting the box (☒) next to the task's name in the "Tasks" section and then clicking the  button above the list.

▼ Task : Create Project Plan



Info

Project : [Acme Website](#)
Phase : [Planning](#)
Client Organization : Acme Inc
Created : 2003-07-15 20:35
Assigned : 2003-07-15 20:35
Modified :

Details

Name : Create Project Plan
Description : make ms project plan with milestones and c
Assigned to : [Project Manager \(manager\)](#)
Status : Open
Completion : 10 %
Priority : Very high
Start date : 2003-07-15
Due Date : 2003-07-18
Estimated Time : 4 hours
Actual Time : hours
Published : No
Comments :

Task update history

No items to display

▼ Linked Content



No items to display

▼ Assignment History

Comment

Task assigned to Project Manager (manager)

DISCUSSIONS

ADD

Instead of constantly exchanging emails and losing track of these important chains of communication, document discussions using this feature in NetOffice. Team members and clients can initiate discussions; the team can conduct discussions without including the client (by not publishing).

To add a discussion to your project, navigate to the **"Discussions" Section** at the bottom of the "Project" Page. Click on the the  button above the discussions list.

Enter the Topic, and Message. To include the client in the discussion by publishing to the client site, select the box (✓) next to **Publish**. Click the **"Save"** button when finished.

Add Discussion

Info	
Project :	Acme Website (#14)
Client :	Acme Inc
Organization :	
Owner :	Project Manager (manager)
Details	
Topic :	Vacations
Message :	Does anyone have upcoming vacations? We need to schedule them into the project plan.
Published :	☒
Save	

POST / CLOSE

To post to a discussion, first navigate to the "Discussion" Page by scrolling down to the "Discussions" section of the "Project" Page. Click on the **"Post Reply"** link in the "Posts" section.

You may **close** the discussion by clicking the  button from the "Discussion" Page. Closing, unlike deleting, leaves a record of the discussion. To **delete** a discussion entirely, select the  button at the top of the "Discussion" Page. Closing, deleting, publishing, and unpublishing can also be done from the "Project" Page under the "Discussions" section.

Post to Discussion : Vacations

Info	
Project :	Acme Website (#14)
Client :	Acme Inc
Organization :	
Owner :	Project Manager (manager)
Published :	Yes
Retired :	No
Posts :	1
Last Post :	2003-07-16 15:47
Details	
Message :	Julie Teamember is going on vacation from November 2 - 15.

NOTES

To keep a brief record of a meeting or phone conversation or to call something to the project's attention, use the note feature of NetOffice.

To add a note to your project, navigate to the **"Notes" section** at the bottom of the "Project" Page. Click on the  button above the notes list. Notes have the following fields:

- **Project:** List of existing projects in the system
- **Date:** date note entered, click the  button for a calendar
- **Topic:** Phone Conversation, General Notes, Conference Notes (your sys admin can customize these)
- **Description:** actual content of note

Click the **"Save"** button when finished. **Edit** the note by clicking the  button on the "Note" Page or by selecting the box (☒) next to the note's name in the "Notes" list on the "Projects" Page and then clicking the  button above the list.

Add Note Entry

Details

Project :

Date : 

Topic :

Subject :

Description :

NEW SUPPORT REQUESTS

When a client experiences technical or other issues with workproduct, he or she can file a **support request** through the Project Site interface. A team member may also file a request through the project site by clicking on the link "Go to Project Site" at the top of any team site page, selecting the appropriate project, and clicking on "Support" on the left-hand side of the page. The "Add Support Request" Page will appear and contains the following fields:

- **Priority** (Very Low, Low, Medium, High, Very High)

- Subject
- Message

After clicking the "Submit" button, the "Support" results page will appear and give the team member an opportunity to respond immediately to the **support response**.

The screenshot shows a web interface for adding a support request. The main content area is titled "Support" and "Add Support Request". It contains a "Priority" dropdown menu with "High" selected, a "Subject" text box with "contact page", and a "Message" text area with "Contact Page gives sendmail error.". A "Submit" button is located at the bottom right of the form. On the left side, there is a sidebar with a "Project : Acme Website" header and a list of navigation links: Home, Project Team, Team Tasks, Client Tasks, Document List, Bulletin Board, Support, My Projects, Preferences, and Log Out.

MANAGING SUPPORT REQUESTS

After a team member or client has filed a support request, the manager or team member can add information to the request, change the request's status, and close the request out. The **"Support" Section** lies beneath "Details" on the Project's main page. The Support Section lists the type and number of requests in the queue: new, open, and complete. To manage a request of any of the three types, click on the "Manage..." link and list of incidents for that type will appear.

To view the incident, click on the title of incident you wish to edit. From here you can:

- change the **status** of the incident by clicking the edit () button (New, Open, Complete)
- click **"Add a Support Response"** to enter a resolution, questions, or comments (see *screen shot*)
- **delete** the support incident by clicking the remove () button
- **close** the incident by changing it's status to "Complete" (see above)

[Projects](#) / [Acme Website](#) / [Support Requests](#) / contact page

Support Request : contact page



Info	
Project :	Acme Website
Subject :	contact page
Priority :	High
Status :	New
Date :	2003-07-16 15:18
User :	Project Manager
Message : Contact Page gives sendmail error.	
Responses	
Add Support Response	

[Home](#) [Projects](#) [Clients](#) [Reports](#) [Search](#) [Calendar](#) [Bookmarks](#) [Admin](#)

[Projects](#) / [Acme Website](#) / [Support Requests](#) / [contact page](#) / [Add Support Response](#)

Details	
Message	Created email accounts for contact page - contact page sendmail now working.
Submit	

LINKED CONTENT

UPLOAD NEW DOCUMENTS

Workflow is a major component in NetOffice. The "**Linked Content**" area of a project centralizes documents, allows for assignments and approvals, and enables versioning and review. You may add a document of any kind here, so long as it does not exceed the file size limits, which you can set in the project's details.

To add a new file, navigate to the desired project's home page and click the **Add** () button under "Linked Content". The "Status" Field regards approvals (Approved, Approved with Changes, Needs Approval, No Approvals Needed, Not Approved). Use the "**Browse**" button to locate the document on your hard drive. Make any comments in the Comment field and add a version number if desired.

User: Project Manager [Log Out](#) [Preferences](#) [Go to](#)

[Home](#) [Projects](#) [Clients](#) [Reports](#) [Search](#) [Calendar](#) [Bookmarks](#) [A](#)

[Projects](#) / [Acme Website](#) / [Add File](#)

Add File

Details

Status : Needs Approval

* Upload : C:\collabowrite\docs\status_report.pdf [Browse...](#)

Comments : status report

Version : 1.0

[Save](#)

Once you click the "Save" button, the "Document" Page will load with the following sections:

- **Details** - lists the document type, name, version, size, owner, comments, publish status, approval status, and version history
- **Peer Reviews**- shows history of peer reviews; allows for peer review uploading with comments
- **Upload Document** - allows for upload of document owner's update with comments and version number

To **view** the uploaded document, click "View" in the version history under Details. To download the document to your hard drive, click "**Save**" in that section.

Document

Details

Type :

Name : 21--status_report.pdf

Version : 1.0

Date last modified : 2003-07-16 19:46

Size: 18.46 KB

Owner : [Project Manager \(manager\)](#)

Comments : status report

Published : No

Approval Tracking : Needs Approval

Version History : Version : 1.0 21--status_report.pdf [View](#) [Save](#)

Peer Reviews

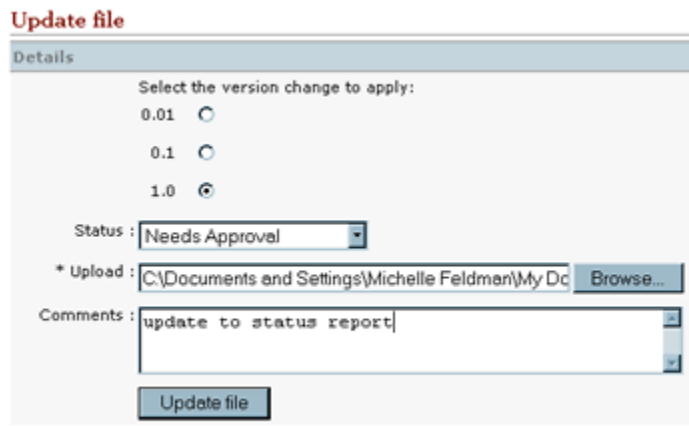
Details

There are currently no revisions of this document

UPDATE DOCUMENTS

The author of a document may make his/her own changes or want to incorporate peer review comments into an existing document. To update the file, navigate to the document's home page and scroll down to the **"Update file"** Section. Check the **version** of the document you are updating, and click on the appropriate version number. The "Status" field refers to approvals (Approved, Approved with Changes, Needs Approval, No Approvals Needed, Not Approved). Use the "Browse" button to locate the updated file on your hard drive and upload it to the server. Make any comments desired.

After you have clicked on **"Update File,"** the document home page will load, listing the newly updated document in **"Version History"** under the Details section. To view the update, click "View" in this section. To download the update to your hard drive, click "Save".



The screenshot shows a web form titled "Update file" in red text. Below the title is a tab labeled "Details". The form contains the following elements:

- A label "Select the version change to apply:" followed by three radio button options: "0.01", "0.1", and "1.0". The "1.0" option is selected.
- A "Status" dropdown menu currently showing "Needs Approval".
- An "* Upload:" label followed by a text input field containing a file path and a "Browse..." button.
- A "Comments:" label followed by a text input field containing the text "update to status report".
- An "Update file" button at the bottom.

PROJECT SITE

CREATE PROJECT SITE

As was explained in the [Introduction](#) to this manual, NetOffice has two primary components: team site and client site. The client site allows your clients to login and see only their project or projects. Furthermore, you can control the documents, assignments, and discussions are available to the client.

NetOffice does not automatically create a site when you create project. To create the client site, navigate to the home page of the project. Scroll down to the last item, titled **"Project Site"** in the **Details** Section and click on the **"Create"** link. The "Create Project Site" Page will appear listing the Project's name and the client organization if selected.

Home Projects Clients Reports Search Calendar Bookmarks Add

Projects / [Acme Website](#) / Create Project Site

Create Project Site

Details
Project : Acme Website
Client Organization : Acme Inc
Create

After clicking the **"Create"** button, the "Project Site" Page will appear. In order for clients to use this site, you must first [add client users to the organization](#) listed as the client for that project, if you have not already done so. Then [add these client users to the project team](#) (explained on the next page). Finally, in order for client users to see any documents, assignment, and so on in their site, you must [publish](#) those items to the site.

A team member can access the Project Site from anywhere within the team site by clicking on the link **"Go to Project Site"** in the top right hand corner of any page. To learn about navigating the client site, see NetOffice for Clients documentation.

User:Project Manager [Log Out](#) !

Home Projects Clients Reports Search Calendar Bookmarks Add

Projects / [Acme Website](#) / Project Site

Project Site : Acme Website

Details
Project : Acme Website (#14)
Client Organization : Acme Inc

Permitted Client Users

No items to display

PROJECT SITE USERS

In order for clients to access the project site for their project, the project must have an associated client organization. Also, the client user must exist first as a user under that client organization (see ["Add Client Users"](#)). To add an existing client user of the assigned organization to the project's team, navigate to the project's home page and scroll down to the last item, Project Site, under Details, and click on the "Details" link.

When the "Project Site" Page for that project appears, scroll down to the "Permitted Client Users" section, and click on the Add () button. When the **"Add Team Members"** Page appears, click on the checkbox next to the name of the client user you want to add and click the Add button again.



The client user can now login to the client site but will not be able to add or edit items until you **publish** the user to the client site. The same is also true for the consulting team members. To publish a client user, navigate to the Permitted Client Users Section of the Project Site Page. Click next to the name of the user to be published and click on the **Publish** () button.



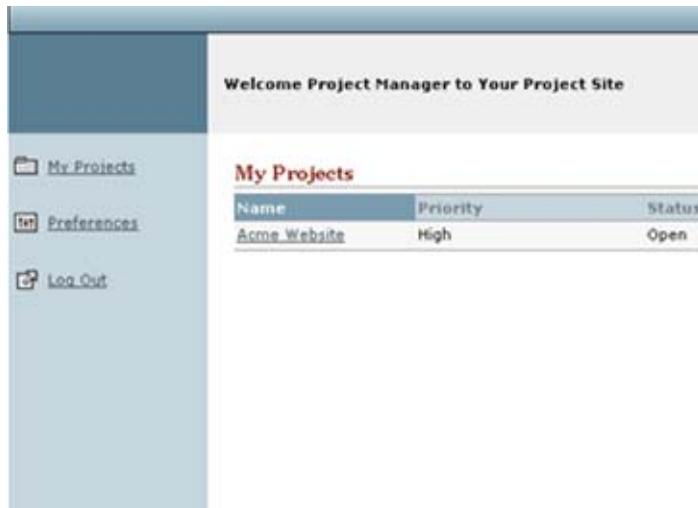
CLIENT ACCESS

When the client user logs into NetOffice, the project site home page will load, rather than the time site. He or she will have **read-only** access to the following items:

- Project Details
- Project Team
- Client Tasks

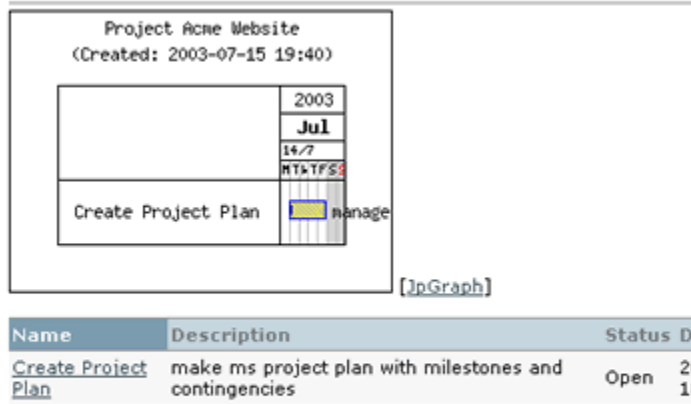
Clients will be able to freely **add and edit**:

- Document List (same as [Linked Content](#))
- Bulletin Board (same as [Discussions](#))
- Support



Clients will be able to post tasks under "**Team Tasks.**" However, in order for the task to appear in the client site, the project manager must log into the team site and navigate to where the tasks are posted (generally to the most current open phase of the project). [Edit the task](#) and assign it to the appropriate team or client user, then [publish](#) (see the next section).

Team Tasks



[Add Task](#)

PUBLISH

In order to see any of the work posted to the team site, team users must publish items to the client site. After adding any item, such as a [document](#) or a [task](#), the user can publish the item by either navigating to the section that contains the item or by going into the home page for that item. If working from a section, select the checkbox next to the item's name then click

the **Publish** () button. If working from the item's home page, simply click the Publish Button at the top of the page. The item will now appear in its appropriate section in the client site.

To **remove** an item from the client site but retain in the system, use the **Unpublish** () button. The Unpublish button is located in the same places as the Publish button.

DELETE SITE

If you decide to remove the client site but wish to retain the project as active on the team site, delete the site. To delete or unpublish the client site, navigate to the project's home page, scroll down to the **"Publish Site"** item at the bottom of the Details Section and click the **"Details"** Link. When the Project Site Page appears, click the Delete () button above the Details Section.

The "Delete Project Site" Page will appear asking for confirmation of the delete. Click the **"Delete"** button to proceed. The project home page will reload with confirmation of the client site removal.

User:Project Manager [Log](#)

[Home](#) [Projects](#) [Clients](#) [Reports](#) [Search](#) [Calendar](#) [Bookm](#)

[Projects](#) / [Acme Website](#) / [Project Site](#) / Delete Project Site

Delete Project Site

Delete the following?
Acme Website
Delete Cancel

OTHER FEATURES

REPORTS

The **Reports** feature in NetOffice can be useful in preparing for status meetings and for compiling new task lists. To put together a report, click on the "Reports" item in the main navigation, located at the top of every page on the team site. The **"Create Report"** Page appears with the following fields (*all fields default to the "Select All" value*):

- Clients - list of Client Organizations in system
- Projects - list of projects in the system
- Assigned To - list of all team and client users (including "Unassigned")

- Due Date - projected date complete; choose either All Dates or enter date range in Between Dates fields
- Complete Date - actual date complete; choose either All Dates or enter date range in Between Dates fields
- Status - Client Completed, Completed, Not Started, Open, Suspended
- Priority - None, Very low, Low, Medium, High, Very high

Note: the user creating the report may only choose values associated with the projects to which he/she is assigned.

Click the "**Create**" button and the "**Report Results**" Page will load with the results produced from the parameters you selected in the previous step. You may edit the report by clicking the edit () button. To **save** the report, type the desired report and the report parameters will be saved. The report will then be accessible from either the My Reports section in the home page or the Reports item in the main navigation. You may also edit or delete the report from there.

Note: saving the report saves the parameters and not the results - therefore if your updates of a project or client impact the report, the results will change the next time you view the report.

SEARCH

NetOffice has a site-wide search facility that allows you to comb the site for words or phrases. To search the team NetOffice installation, click on "**Search**" in the main navigation located at the top of every page. The "Search" Page will load, asking for **keywords**. You can also specify where in NetOffice you want to conduct the search (All content, Notes, Client Organizations, Projects, Tasks, Discussions, Users). If you choose "All Content," the search items will appear categorized under their appropriate headings (ie - "Notes"). The "**Search Results**" Page contains all categorized results and allows the user to search again at the bottom of the results.

Search results for keywords : acme	
3 Matches	

▼ Search Results : Projects (1)



☐ ID	Project ▲	Priority	Client Organization	Status	0
☐ 14	Acme Website	High	Acme Inc	Open	ff

▼ Search Results : Users (1)

☐ Full name ▲	User Name	E-Mail	Work Phone
☐ Jane Acme	acme		2125553456

▼ Search Results : Client Organizations (1)

☐ Name ▲	URL	Phone
☐ Acme Inc		2125552345

Create Report

Select your task reporting parameters here and save the query running your report.

Clients :

Select All

Acme Inc

Projects :

Select All

Acme Website

Assigned to :

Select All

Unassigned

collabowrite

democlient (Client User)

Due Date : ☒ All dates

☐ Between dates

and

Complete date : ☒ All dates

☐ Between dates

and

Status :

Select All

Client Completed

Completed

Not Started

Priority :

Select All

None

Very low

Low

Create

[Reports](#) / Report Results

Report Results

2 Matches

Report Results



☐ Task ▲	Priority	Status	Due Date	Complete date	Assigned to
☐ "Services" Section	High	Not Started	2003-07-17		Unassigned
☐ Create Project Plan	Very high	Open	2003-07-18		manager

Save this report query to your homepage so you can run the query again

Report Name :

Save

CALENDAR

NetOffice contains a calendaring component, though the calendar is not currently integrated with the projects or tasks elements so the user must manually add items on the calendar. The calendar is optimal for meetings, milestones/deliverables, and other events.

To add an event to the calendar, click on **"Calendar"** in the main navigation, located at the top of every page. The current month page will load - to add an event to a different, click on the "Previous" or "Next" link at the bottom left of the page. Click on the **day** link located in the top right hand corner of every day on the calendar page. The home page for that day will appear - click the add () button.

July 2003

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14 Task: Create Project Plan (Start date)	15	16	17	18 Task: Create Project Plan (Due Date)	19	20
21	22	23	24	25	26	27
28	29	30	31			

[Previous](#) | [Today](#) | [Next](#)

Calendar

The "**Add Event**" Page will appear with the following fields:

- Subject (the long name of the event)
- Description
- **Short Name** (required - will appear in the day)
- Start date (defaults to day you selected) - change manually or using calendar  button
- End date (defaults to day you selected) - change manually or using calendar  button
- Start Time
- End Time
- Reminder (Yes or No)
- Event recurs... (Checkbox) - *Note: there is no ability to change the end date or type for recurrence*

Click "**Save**" to add the event. To **edit** the event, navigate back to the calendar day page, and click the box next to the event and the edit () button. To **delete** the event, click the remove () button in the same manner. You can also **export** the event as an iCalendar file using the export () button. *Note: there is no ability currently to publish to or view on the Project Site.*

Add:

Details

Subject :

Description :

* Short name
[Help] :

Start date :

End date :

Start time :

End time :

Reminder : ☐ No ☒ Yes

Event recurs
every week on
this day : ☒

BOOKMARKS

To keep track of web site addresses associated with your projects, use the bookmarking function. Click on the "**Bookmarks**" item in the main navigation, located at the top of every page on the team site. The "Add Bookmark" Page will appear with the following fields:

- Category
- New Category - adds a new category to the above drop-down
- Name
- URL
- Description
- Shared (checkbox) - all team members see
- Home (checkbox) - puts bookmark under "My Bookmarks" on your home page
- Comments (checkbox) - not currently functional
- Private - select from list of team members if you want only limited sharing

Click the "**Save**" button and the Bookmarks page will load listing the new bookmark. Use the **edit** () button to edit or the remove () button to **delete**.

Add bookmark

Details	
Category :	-
New category :	acme
Name :	PhPCollab
URL :	http://phpcollab.sourceforge.net
Description :	
Shared :	☒
Home :	☒
Comments :	☒
Private :	admin collabowrite maisie teammember tim
Save	

GNU Free Documentation License



GNU FREE DOC
LICENSE.doc

< < Double Click File to Open